Train

User Manual

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The text of this manual is subject to change without notice. The current version of the manual is available from the Train documentation page: www.lmp.co.uk/train_docs.html

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Part I

1 Getting Started

1.1 Logging On

Double-click on the Train icon to access the Logon screen.

Train requires a Username and Password to be entered before access is allowed. This is to:

- ensure that the correct data is made available to individual users,
- protect the integrity of data stored, and
- ensure that the correct security settings are applied to prevent misuse of the system.

Logon Screen

1. Enter the login name and password (as provided by LMP or the System Administrator) into the appropriate boxes.
2. Where a secure internet connection is required, place a tick in the "Use secure connection" box.
3. Click **Login**.

NOTE: Usernames and passwords within Train are not case sensitive – "M.BROWN", "M.Brown", and "m.brown" are all valid. However, the use of punctuation, or spaces between characters, is relevant and where applicable should be maintained.

1.2 Exiting Train

To exit Train and close the program, click the cross in the top right hand corner of the screen.

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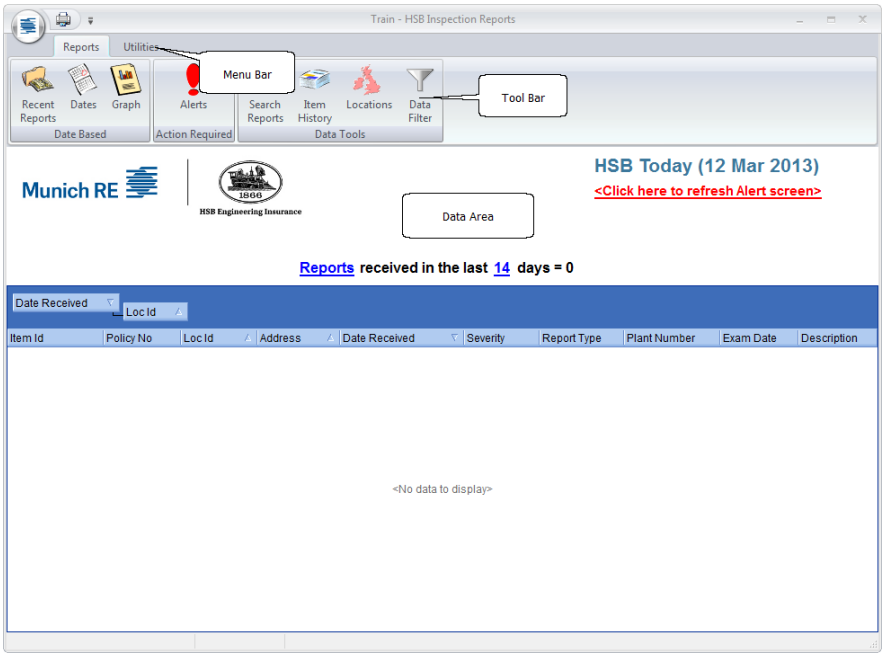
1.3 Screen Layout

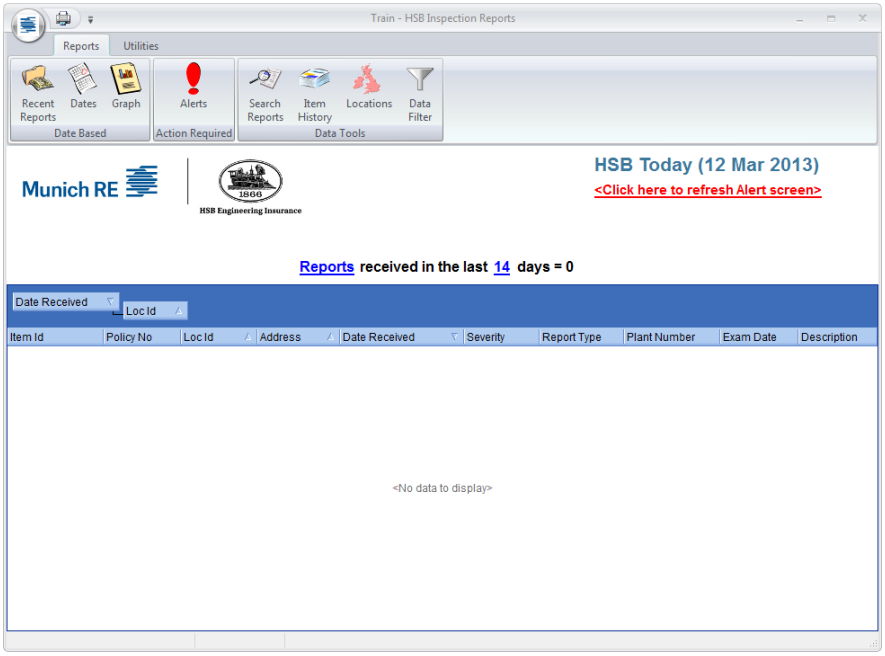
All screens within Train share a similar format:



- Menu Bar - this consists of File, View, Toolbars, Utilities and Help menu options and remains static throughout Train.
- Tool Bar - the main navigational point within Train. Click on a Tool Bar option to move to that screen.
- Data Area - information requested from Train is displayed in the Data Area. Data displayed, and actions that can be carried out on the data, vary from screen to screen.

1.4 Recent Reports

After logging in, Train will open onto the "HSB Today" screen:



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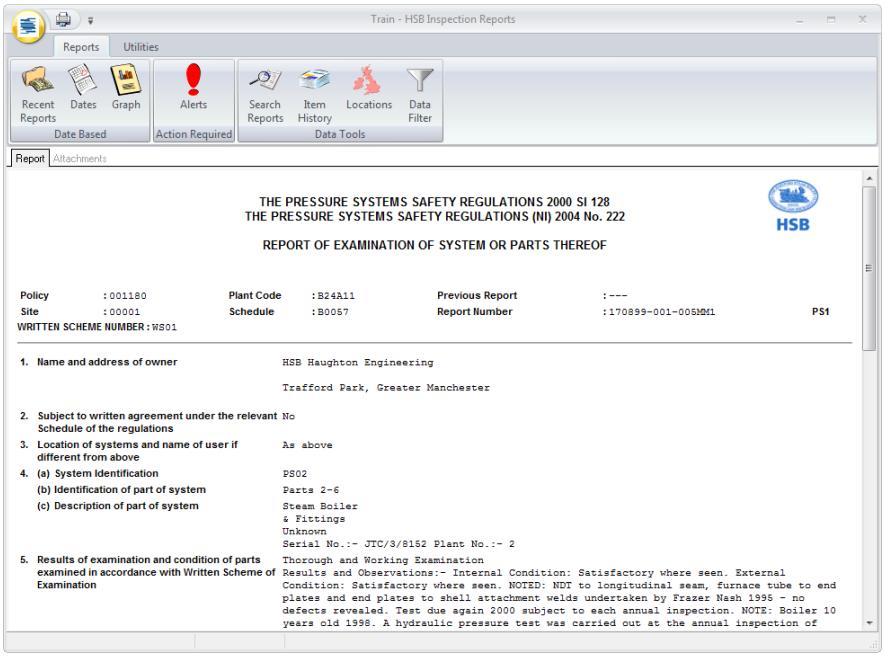
The Today screen is Train's equivalent of an email inbox. As reports are received, summary details are displayed on the Today screen.

To read a report, double click on the appropriate summary details:

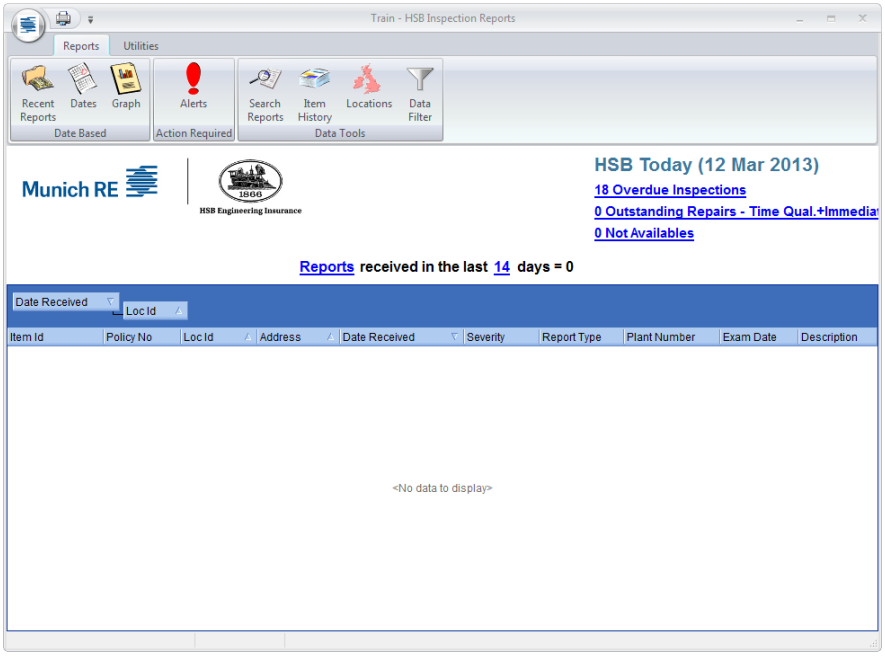

Train - HSB Inspection Reports
Reports
Utilities
Recent Reports
Dates
Graph
Date Based
Alerts
Action Required
Search Reports
Item History
Locations
Data Filter
Data Tools
Report
Attachments
THE PRESSURE SYSTEMS SAFETY REGULATIONS 2000 SI 128
THE PRESSURE SYSTEMS SAFETY REGULATIONS (NI) 2004 No. 222
REPORT OF EXAMINATION OF SYSTEM OR PARTS THEREOF
HSB
Policy : 001180
Site : 00001
WRITTEN SCHEME NUMBER : WS01
Plant Code : B24A11
Schedule : B0057
Previous Report : ---
Report Number : 170899-001-005MM1
PS1
1. Name and address of owner
HSB Haughton Engineering
Trafford Park, Greater Manchester
2. Subject to written agreement under the relevant Schedule of the regulations
No
3. Location of systems and name of user if different from above
As above
4. (a) System Identification
PS02
(b) Identification of part of system
Parts 2-6
(c) Description of part of system
Steam Boiler
& Fittings
Unknown
Serial No.:- JTC/3/8152 Plant No.:- 2
5. Results of examination and condition of parts examined in accordance with Written Scheme of Examination
Thorough and Working Examination
Results and Observations:- Internal Condition: Satisfactory where seen. External Condition: Satisfactory where seen. NOTED: NDT to longitudinal seam, furnace tube to end plates and end plates to shell attachment welds undertaken by Frazer Nash 1995 - no defects revealed. Test due again 2000 subject to each annual inspection. NOTE: Boiler 10 years old 1998. A hydraulic pressure test was carried out at the annual inspection of

Once the report has been read, click to return to the Recent Reports screen.

By default, the Today screen displays a list of reports received within the last 14 days. This view may be altered to show items rather than reports, and the time-frame can be changed to 1, 7, 14, 21, 28 or 91 days. To choose to view items or to change the time-frame, click on Reports or 14 and select the required option from the subsequent drop-down list.

Alert details

Clicking on <Click here to refresh Alert screen> will display the Alert screen. If the Recent Reports page is reselected, the view will alter:



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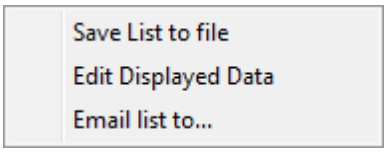
Clicking on any of the links will switch the view to the Alert screen and display the relevant tab.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

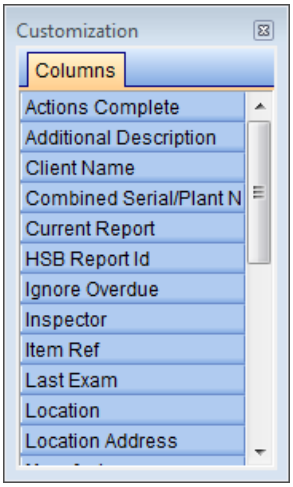
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

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Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

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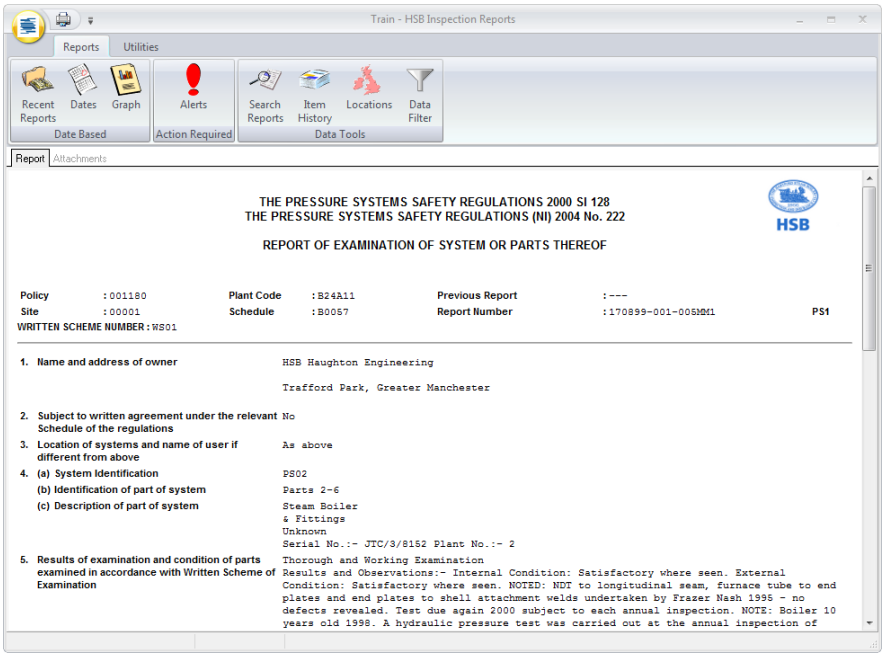
Part II

2 Reports

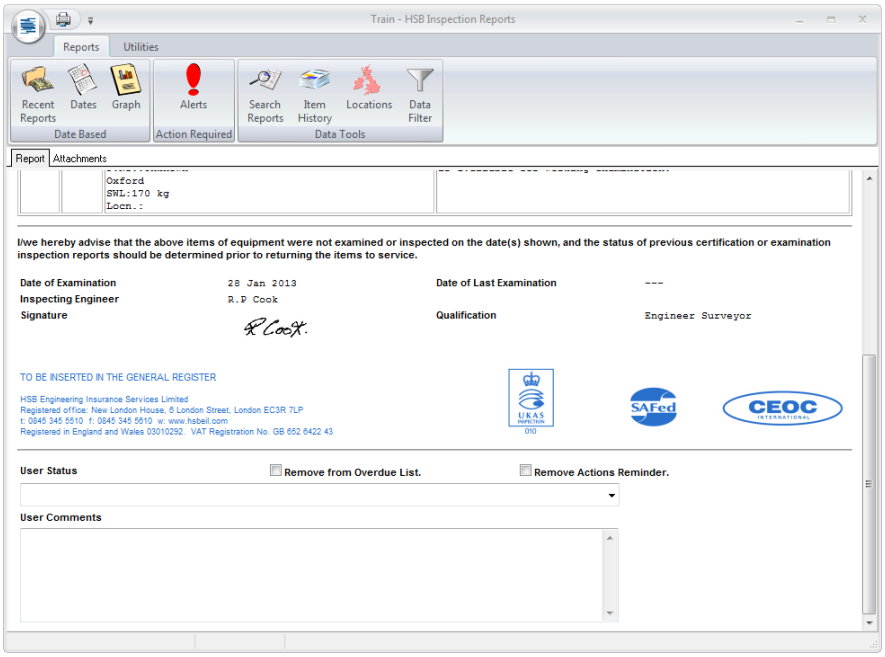
To view a report, double-click on the appropriate report details in the data area of the screen. The selected report will be displayed in a similar format to a paper version:


Train - HSB Inspection Reports
Reports
Utilities
Recent Reports
Dates
Graph
Date Based
Alerts
Action Required
Search Reports
Item History
Locations
Data Filter
Data Tools
Report
Attachments
THE PRESSURE SYSTEMS SAFETY REGULATIONS 2000 SI 128
THE PRESSURE SYSTEMS SAFETY REGULATIONS (NI) 2004 No. 222
REPORT OF EXAMINATION OF SYSTEM OR PARTS THEREOF
HSB
Policy : 001180
Site : 00001
Plant Code : B24A11
Schedule : B0057
Previous Report : ---
Report Number : 170899-001-005MM1
PS1
WRITTEN SCHEME NUMBER : WS01
1. Name and address of owner
HSB Haughton Engineering
Trafford Park, Greater Manchester
2. Subject to written agreement under the relevant Schedule of the regulations
No
3. Location of systems and name of user if different from above
As above
4. (a) System Identification
PS02
(b) Identification of part of system
Parts 2-6
(c) Description of part of system
Steam Boiler
& Fittings
Unknown
Serial No.:- JTC/3/8152 Plant No.:- 2
5. Results of examination and condition of parts examined in accordance with Written Scheme of Examination
Thorough and Working Examination
Results and Observations:- Internal Condition: Satisfactory where seen. External Condition: Satisfactory where seen. NOTED: NDT to longitudinal seam, furnace tube to end plates and end plates to shell attachment welds undertaken by Frazer Nash 1995 - no defects revealed. Test due again 2000 subject to each annual inspection. NOTE: Boiler 10 years old 1998. A hydraulic pressure test was carried out at the annual inspection of

Normally, the entire report will not fit onto the screen, so a scroll bar at the right hand edge allows a view of the whole report to be obtained through scrolling up or down.

User Comments

Uniquely, electronic reporting offers a User Comments section. This enables the tracking of actions performed as a result of the report, and also allows the action and overdue reminders for a particular report to be cleared:



To record a comment:

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Field Name	Action	Result
Remove from Overdue List	Single click	Once selected, the current report will no longer appear on the "Overdue Inspection" list of the Alert screen.
Remove Actions Reminder	Single click	Once selected the current report will no longer appear on the "Outstanding Defects" list of the Alert screen.
User Status	Pick list	Choose from a list of standard responses. Information input here will be stored against the current report. "User Status" can be used as a criterion on the Search screen.
User Comments	Text entry	Click into the box under "User Comments" and input the required text. Information input here will be stored against the current report and, where selected, will appear in subsequent printouts.

NOTE: There is no 'Save' button in Train. Changes are saved automatically on exit from the screen.

Printing a report

Select {icon} Print from either the Utilities tab or in the window title area.

The standard Windows print control box will open offering a choice of printer. If the selected report is too large to fit onto a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Exporting a report

A report may be saved to a file or emailed from Train:

To save a report:

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the report is to be saved, select the required file type from the drop-down list and set a filename.
4. Click **Save**.

To email a report:

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click Send Message. Depending on the Email options which have been set, the report will be sent as either an attachment to the email or as the body of the email message.

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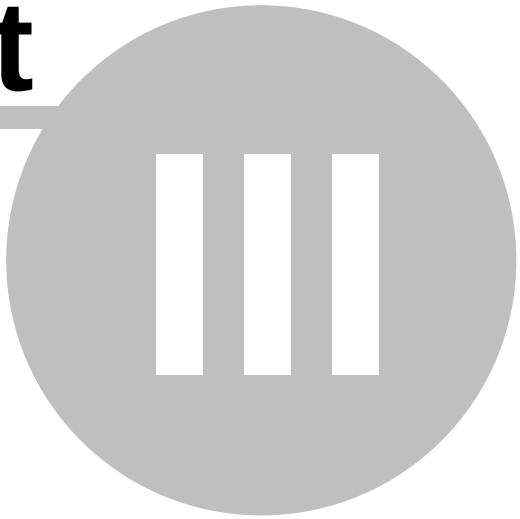
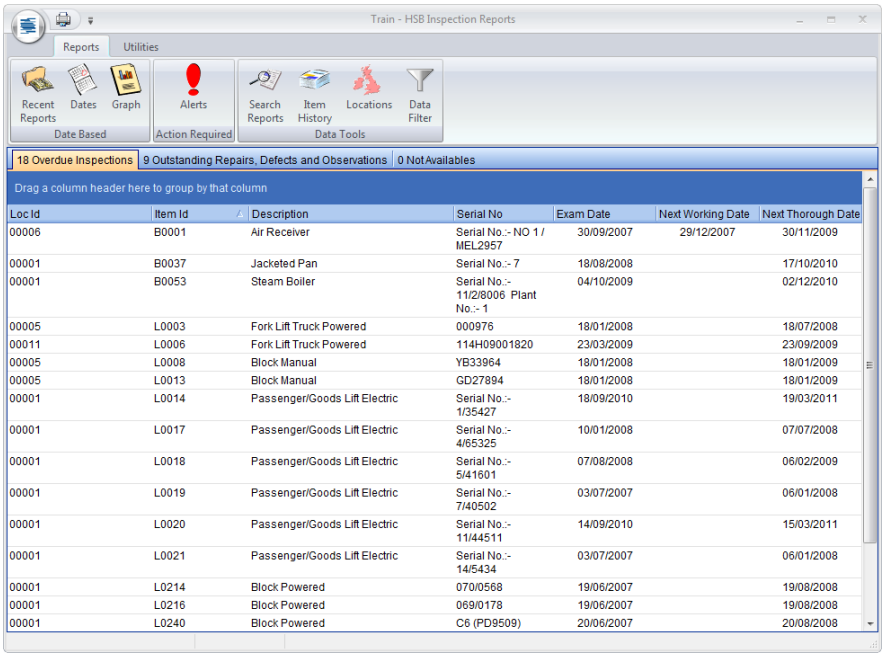
Part



3 Alert

The Alert screen is accessed either via the icon or by selecting the <Click here to refresh Alert screen> on the "Recent Reports" page. It offers an overview, via three tabs, of reports of inspections which:

- have overdue reports listed against them and require a more recent inspection report (Overdue Inspections)
- require remedial action by the owner/user of the plant (Outstanding Repairs)
- could not have an examination carried out (Not Availables)

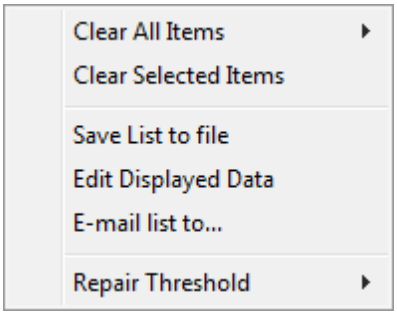


Loc Id	Item Id	Description	Serial No	Exam Date	Next Working Date	Next Thorough Date
00006	B0001	Air Receiver	Serial No.:- NO 1 / MEL2957	30/09/2007	29/12/2007	30/11/2009
00001	B0037	Jacketed Pan	Serial No.:- 7	18/08/2008		17/10/2010
00001	B0053	Steam Boiler	Serial No.:- 11/2/8006 Plant No.:- 1	04/10/2009		02/12/2010
00005	L0003	Fork Lift Truck Powered	000976	18/01/2008		18/07/2008
00011	L0006	Fork Lift Truck Powered	114H09001820	23/03/2009		23/09/2009
00005	L0008	Block Manual	YB33964	18/01/2008		18/01/2009
00005	L0013	Block Manual	GD27894	18/01/2008		18/01/2009
00001	L0014	Passenger/Goods Lift Electric	Serial No.:- 1/35427	18/09/2010		19/03/2011
00001	L0017	Passenger/Goods Lift Electric	Serial No.:- 4/65325	10/01/2008		07/07/2008
00001	L0018	Passenger/Goods Lift Electric	Serial No.:- 5/41601	07/08/2008		06/02/2009
00001	L0019	Passenger/Goods Lift Electric	Serial No.:- 7/40502	03/07/2007		06/01/2008
00001	L0020	Passenger/Goods Lift Electric	Serial No.:- 11/44511	14/09/2010		15/03/2011
00001	L0021	Passenger/Goods Lift Electric	Serial No.:- 14/5434	03/07/2007		06/01/2008
00001	L0214	Block Powered	070/0568	19/06/2007		19/08/2008
00001	L0216	Block Powered	069/0178	19/06/2007		19/08/2008
00001	L0240	Block Powered	C6 (PD9509)	20/06/2007		20/08/2008

By default, the Alert screen opens on the Overdue Inspections tab.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Clear All Items/Clear Selected Items

Depending on the currently selected tab, selecting the Clear All Items option and clicking the subsequent Confirm button will clear all overdue inspections, items marked as not available or any defects. Selecting specific items and clicking Clear Selected items will clear these.

Delete Report

NOTE: This option has no effect. Reports cannot be deleted from Train.

Save List to file

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To save the currently displayed report listing:

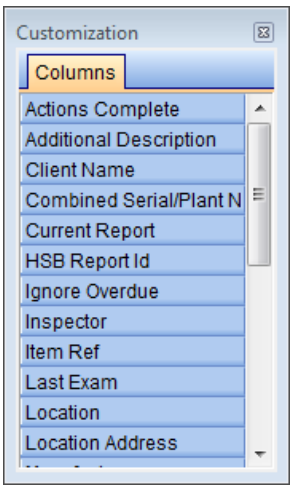
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

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1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

3.1 Overdue Inspections

Details of assets which are overdue for inspection are displayed on the Overdue Inspections tab.

Clearing Overdue Inspections

Overdue inspections are automatically cleared from the Alert screen when a new report is received. However, where an asset has been scrapped or moth-balled, its details may be removed from the Overdue Inspections or Not Availables tabs by amending the User Comments tab on the last received report:

1. Double-click on the required item to view the last received report.
2. Select the User Comments tab at the top of the screen.
3. Click into the "Remove from Overdue List" tick box.
4. Add any necessary detail in the User Comments field
5. Click the icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

(NOTE: There is no Save button. Train automatically saves any changes upon return to the Alert screen).

Overdue Slack period

It is possible to increase the number of days an item has to be overdue before it appears on the Alert screen (Overdue Slack period). By default, the Overdue Slack period is set to 0 (ie items will appear on the Overdue screen as soon as they are overdue).

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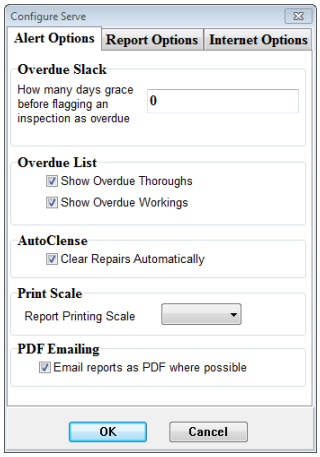
To increase the Overdue Slack:

1. Select Utilities > Configure Train from the Menu Bar.
2. The "Configure" dialog box will open on the **Alert Options** tab:

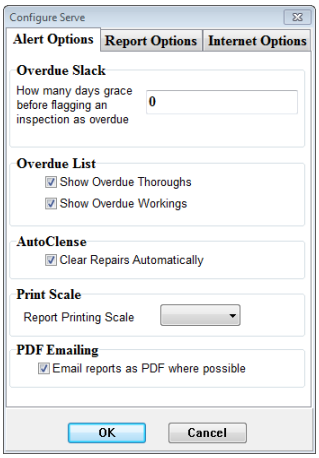


3. Click into the **Overdue Slack** box and input the number of days grace required.
4. Click **OK**. The Configure box will close and the Alert screen will automatically refresh to reflect any changes.

Overdue List

The reports displayed on the Overdue List may be altered to show overdue thorough or overdue working inspection types:

1. Select Utilities > Configure Train from the Menu Bar.
2. The "Configure" dialog box will open on the **Alerts** tab:



3. Click the tick boxes in the **Overdue List** box to toggle the inspection types on and off.
4. Click **OK**. The Configure box will close and the Alert screen will automatically refresh to reflect any changes.

3.2 Repairs

Repair Threshold

Four levels of repair categorisation are offered by Train. The repair thresholds are:

- Immediate Repairs only - statutory repairs requiring immediate attention
- Immediate and Time Qualified Repairs - as above, plus time-qualified statutory repairs
- Repairs and Defects - as above, plus non time-qualified or non-statutory repairs.
- All Repairs, Defects and Observations - as above, plus comments made by the inspector/surveyor.

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The currently selected repair threshold is indicated by the name of the "Outstanding Repairs" tab. To change the displayed threshold:

1. Right-click in the Data Area of the Alert screen.
2. Select Repair Threshold and then the required level of categorisation from the subsequent menu.
3. The Outstanding Repairs tab will automatically refresh to reflect the newly selected repair threshold.

Outstanding Repairs

Repair information is automatically cleared from the Alert screen when a new report which does not list any repairs is received. Where an asset is repaired following an inspection, it is possible to remove it from the Outstanding Repairs screen:

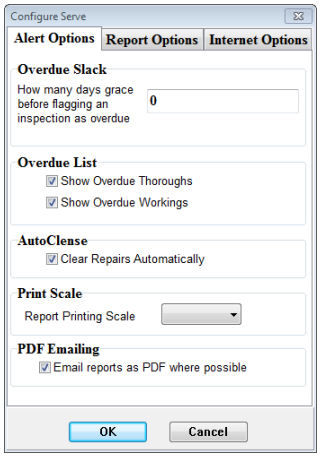
1. Double-click on the required item to view the last received report.
2. Select the User Comments tab at the top of the screen.
3. Click into the "Remove Actions Reminder" tick box.
4. Add any necessary detail in the User Comments field
5. Click the icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

(NOTE: There is no Save button. Train automatically saves any changes upon return to the Alert screen).

Autoclense

By default, all outstanding repairs are displayed. This view may be amended to show only those repairs identified on the most recent report through the use of Autoclense:

1. Select Utilities > Configure Train from the Menu Bar.
2. The "Configure" dialog box will open on the **Alerts** tab:



3. Click into the **Autoclense - Clear Repairs Automatically** box.
4. Click **OK**. The Configure box will close and the Alert screen will automatically refresh to reflect any changes.

(NOTE: Autoclense does not clear repairs against older reports, it simply hides them from view).

3.3 Not Available

Reports listed on the Not Availables tab are reports of non-inspection. Reasons for the non-inspection are detailed within individual reports. The HSB telephone number is included at the foot of each report in order to rearrange an inspection.

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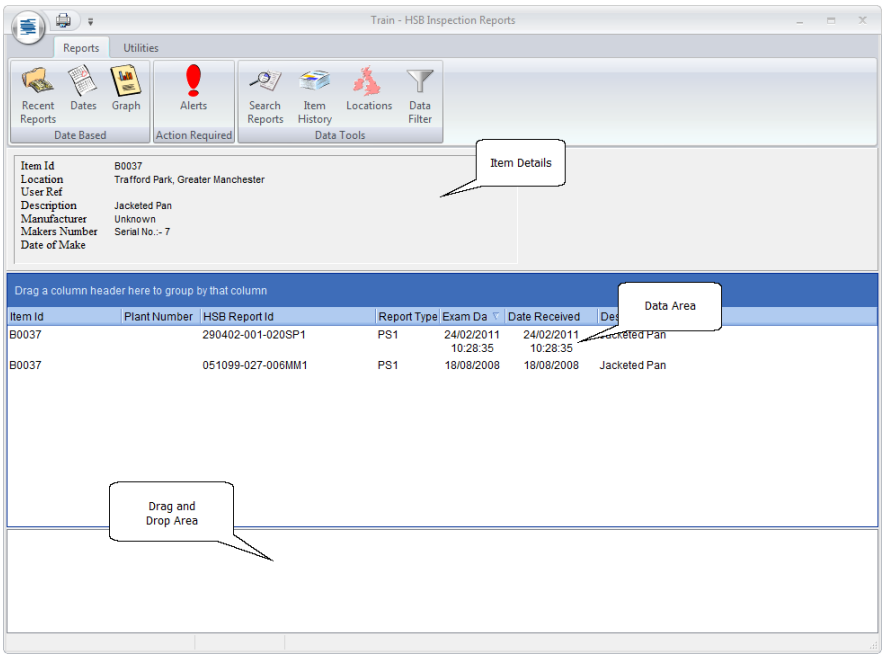
Part IV

4 History

The Item History screen provides detailed information on a selected item of plant and displays all reports that have been received for the selected item.

HINT: To view the History screen, a report for the relevant item must have been viewed. If a report has not been viewed clicking will have no effect.



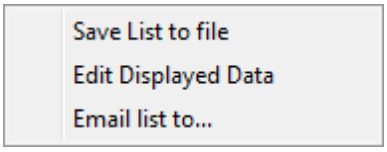
Attaching documents

Train enables documents (for example scanned images or Word documents) to be stored on the History screen of an asset through "drag and drop". To attach a document:

1. View the History of the item in question.
2. Navigate to the location in which the required file is held.
3. Click on the appropriate file name and, holding down the left-hand mouse button, drag the file to the Drag and Drop Area of the History screen and release the mouse button.
4. In the subsequent "Document Details" dialog box, select the method to save the document:
   - **Document stored in database** - a copy of the document will be stored in the Train database. This is the most secure method of saving a file, as once saved, the document cannot subsequently be altered.
   - **Document stored as link** - saving files as links creates a shortcut from the Train database to the location in which the file is held. Any changes made to the file will be reflected in the file accessed by Train.
5. Add a Document Description.
6. Click **OK** to save the document, or **Cancel** to abandon the file attachment.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

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To save the currently displayed report listing:

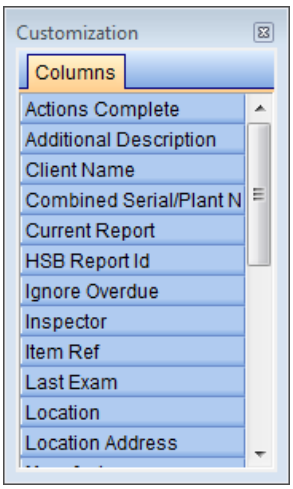
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

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1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

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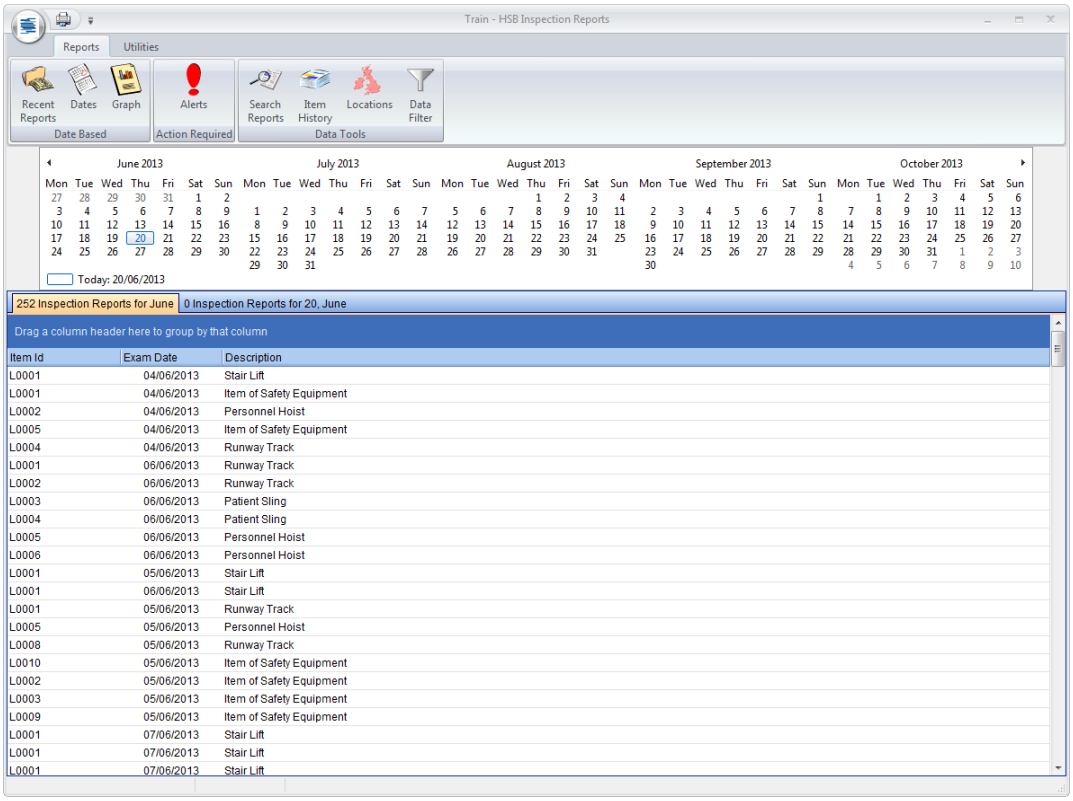
Part V

5 Dates

The Dates screen provides details of reports received on a particular day or in a particular month.

To access the Dates screen, select from the Tool Bar.

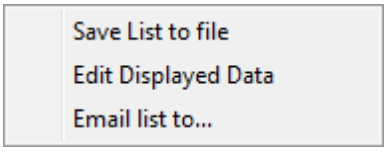


The upper portion of the screen is a calendar which defaults to today's date. The lower portion of the screen has two tabs which display a listing of inspection reports received. The first tab displays reports received in the current month whist the second tab displays reports received on the current day.

Click on an alternate date to change the view to the required date. If the date is not visible on the calendar listing, click one of the displayed Month/Year headings and click to choose as appropriate. Clicking on the Month/Year heading will cause a monthly calendar to display. Clicking on the Year heading on this calendar will group years into decades, clicking again will cause centuries to display.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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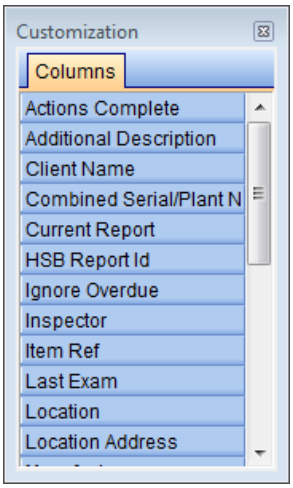
Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).

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2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

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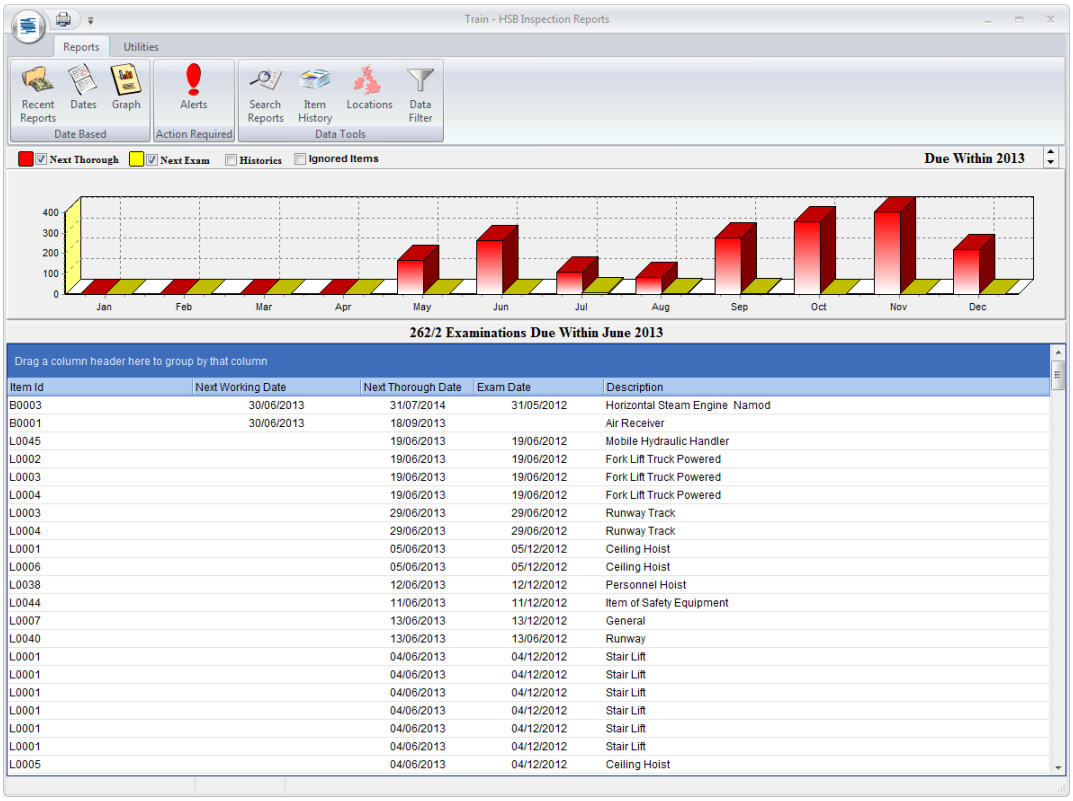
Part VI

6 Graph

From information contained within previously issued reports, Train produces graphs to show when the next inspection for a particular item of plant is due. To access the graphing option, click on the Tool Bar. The Graph screen will open showing a graph of next thorough and next interim exams due within the current year:

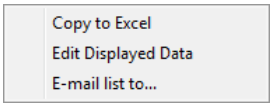


Item Id	Next Working Date	Next Thorough Date	Exam Date	Description
B0003	30/06/2013	31/07/2014	31/05/2012	Horizontal Steam Engine Namod
B0001	30/06/2013	18/09/2013		Air Receiver
L0045		19/06/2013	19/06/2012	Mobile Hydraulic Handler
L0002		19/06/2013	19/06/2012	Fork Lift Truck Powered
L0003		19/06/2013	19/06/2012	Fork Lift Truck Powered
L0004		19/06/2013	19/06/2012	Fork Lift Truck Powered
L0003		29/06/2013	29/06/2012	Runway Track
L0004		29/06/2013	29/06/2012	Runway Track
L0001		05/06/2013	05/12/2012	Ceiling Hoist
L0006		05/06/2013	05/12/2012	Ceiling Hoist
L0038		12/06/2013	12/12/2012	Personnel Hoist
L0044		11/06/2013	11/12/2012	Item of Safety Equipment
L0007		13/06/2013	13/12/2012	General
L0040		13/06/2013	13/06/2012	Runway
L0001		04/06/2013	04/12/2012	Stair Lift
L0001		04/06/2013	04/12/2012	Stair Lift
L0001		04/06/2013	04/12/2012	Stair Lift
L0001		04/06/2013	04/12/2012	Stair Lift
L0001		04/06/2013	04/12/2012	Stair Lift
L0001		04/06/2013	04/12/2012	Stair Lift
L0005		04/06/2013	04/12/2012	Ceiling Hoist

A report listing for the current month will display in the lower part of the screen. To change to an alternate month, click on the appropriate bar on the graph.

Report Listing

The Report Listing on the Detail Tab offers a number of options. Right-click in the Data Area to view the options menu:



Copy to Excel

To save the currently displayed report listing to a spreadsheet:

1. Right-click in the Data Area of the screen.
2. Select "Copy to Excel" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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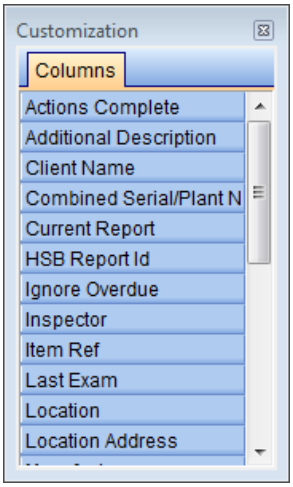
Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.

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3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

6.1 Graph options

The default options on the Graph screen can be altered to amend the information graphed and displayed.

The following options are available:

Show next through dates - selected by default and shows inspections yet to be carried out

- Show next exam - includes non-statutory examinations and shows inspections yet to be carried out
- Show completed examinations - selecting the 'Historics' option causes items for which an inspection has already been carried out to be displayed on the Graph screen.
- Show ignored items - enabling this option will cause reports which have been marked as 'Ignored' (have been marked to be removed from the Overdue List either by a user or through the Autoclense function) to appear on the Graph screen.

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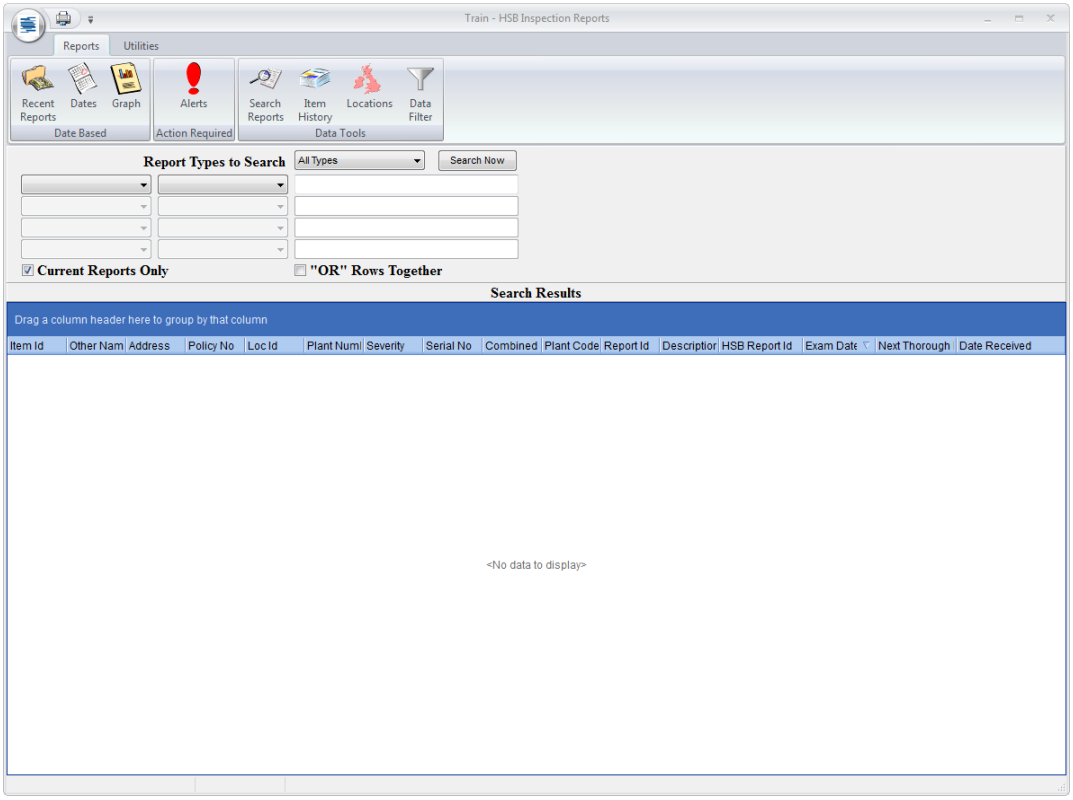
Part VII

7 Search

Search enables the creation of lists of reports that meet user-defined criteria.



By default, the **Current Reports Only** option is ticked. This means that only the most recently received report for each relevant item is included in the search results. To view every (historic as well as current) report that meets the search criteria, click into the **Current Reports Only** box to turn the option off.

Building a search

1. Select from the Tool Bar.
2. The Search screen will open as above.
3. Set the "Report Types to Search" from the drop-down list. The default setting is **All Types** but the full listing is:
   - All Types
   - Pressure Plant
   - Lifting Equipment / Lifts
   - Power Press
   - Local Exhaust Ventilation
   - Electrical / Mechanical
   - Electrical Wiring
   - Not Availables

   Selecting any other type than All Types will restrict the returned search results to just one category of report.

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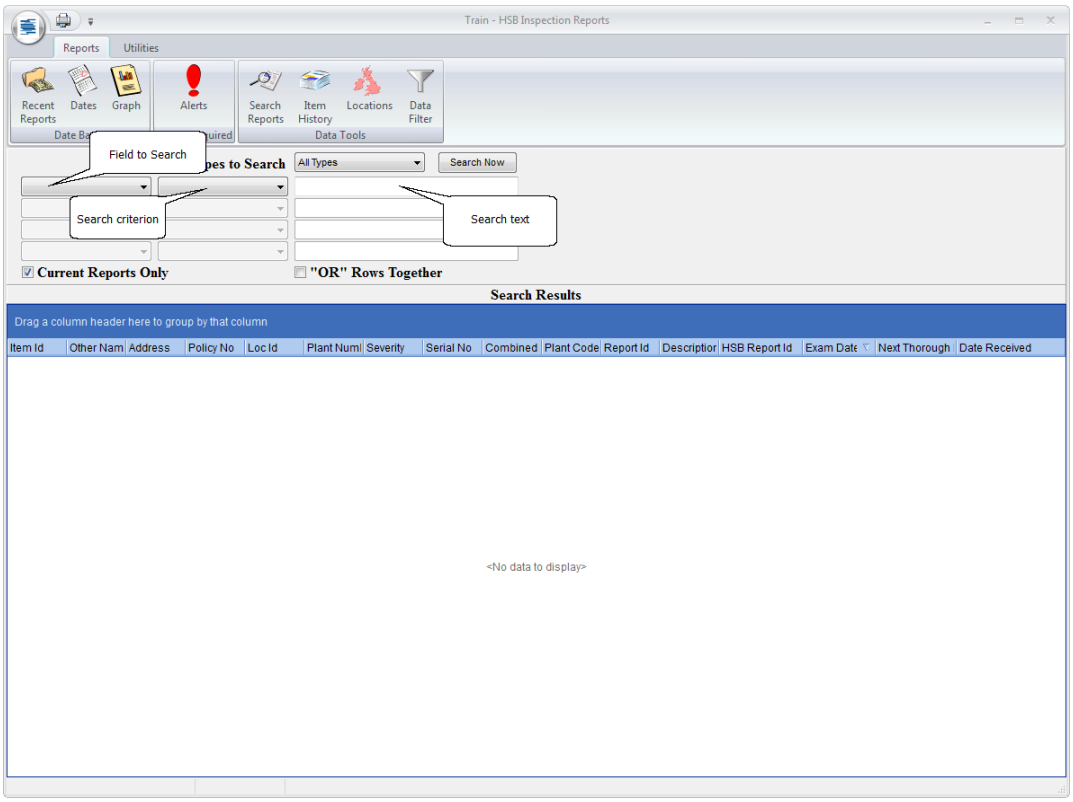
4. Now build the search rules:



   i. Select the field to be searched from the drop-down menu in the left-hand box (**Field to Search** box).
   ii. Select the appropriate criterion to be applied to the search from the drop-down list in the middle box (**Search Criterion** box). NOTE: Depending on the field selected in the first box a criterion may automatically appear here. This can be amended if needed via the drop-down list.
   iii. Input the text to search for in the right-hand box (**Search Text** box).
   iv. Repeat steps i-iii in the other rows of the Search screen as required (a maximum of four rows of search terms is available).
5. Toggle the "Current Reports Only" tick box on/off as required.
6. Where more than one row of search criteria is constructed, the rows will by default be linked with an AND command (returning only those records where all criteria are met). To find records where any criterion is met, click into the "OR" Rows Together box.
7. Click **Search Now** to display the results of the search.

Text field criteria

Fields that are text based (for example Item Id, Description, Location, Manufacturer etc) offer the following criteria:

- Contains
- Doesn't contain
- Is exactly
- Is not

For example, to search for reports containing the manufacturer name 'Craven':

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Manufacturer" from the drop-down list in the left-hand search box.
3. Select "Contains" from the drop-down list in the middle search box.
4. Input "Craven" in the right-hand search box.
5. Click **Search Now** to display the results of the search.

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Date field criteria

Fields that are date based (for example Next Thorough Date, Exam Date etc) offer the following criteria:

- Is before the
- Is after the
- Is on or before the
- Is on or after the
- Is the
- Is not the

To search for reports with an Exam date between 30 June 2009 and 31 December 2010:

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Exam Date" from the drop-down list in the left-hand search box.
3. Select "Is on or after the" from the drop-down list in the middle search box.
4. Input 30/6/09 in the right-hand search box.
5. In the left-hand search box of the second row, select "Exam Date" from the drop-down box.
6. Select "Is on or before the" from the drop-down list in the middle search box.
7. Input 31/12/10 in the right-hand search box.
8. Toggle the "Current Reports Only" tick box on/off as required.
9. Click **Search Now** to display the results of the search.

Repairs by Severity

It is possible to search for repairs by severity. However, within Train, the severity of repairs detailed is stored as a number in the range 1 to 4. The numbers relate to degree of severity thus:

5 Immediate Repairs
4 Time qualified Repairs
3 Other identified defects
2 Observations
1 Clear

Criteria available on the Severity field are:

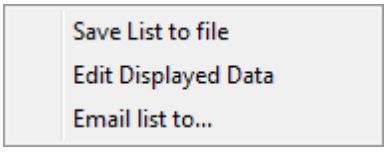
- Is less than
- Is greater than
- Is exactly
- Is not

For example, to search for immediate repairs listed on current reports:

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Severity" from the drop-down list in the left-hand search box.
3. Select "Is exactly" from the drop-down list in the middle search box.
4. Input "4" in the right-hand search box.
5. Ensure "Current Reports Only" is ticked.
6. Click **Search Now** to display the results of the search.

Search Results Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.

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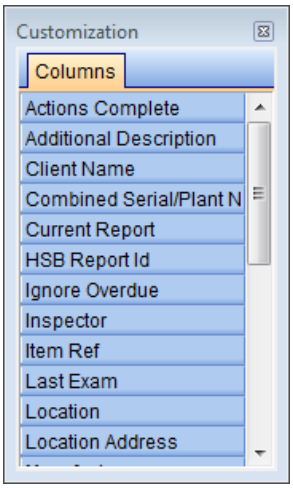
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in

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blue).
- To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).

2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

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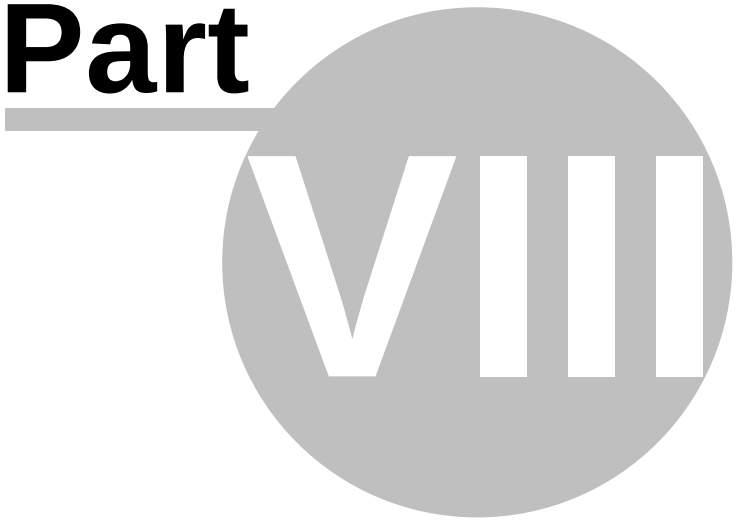
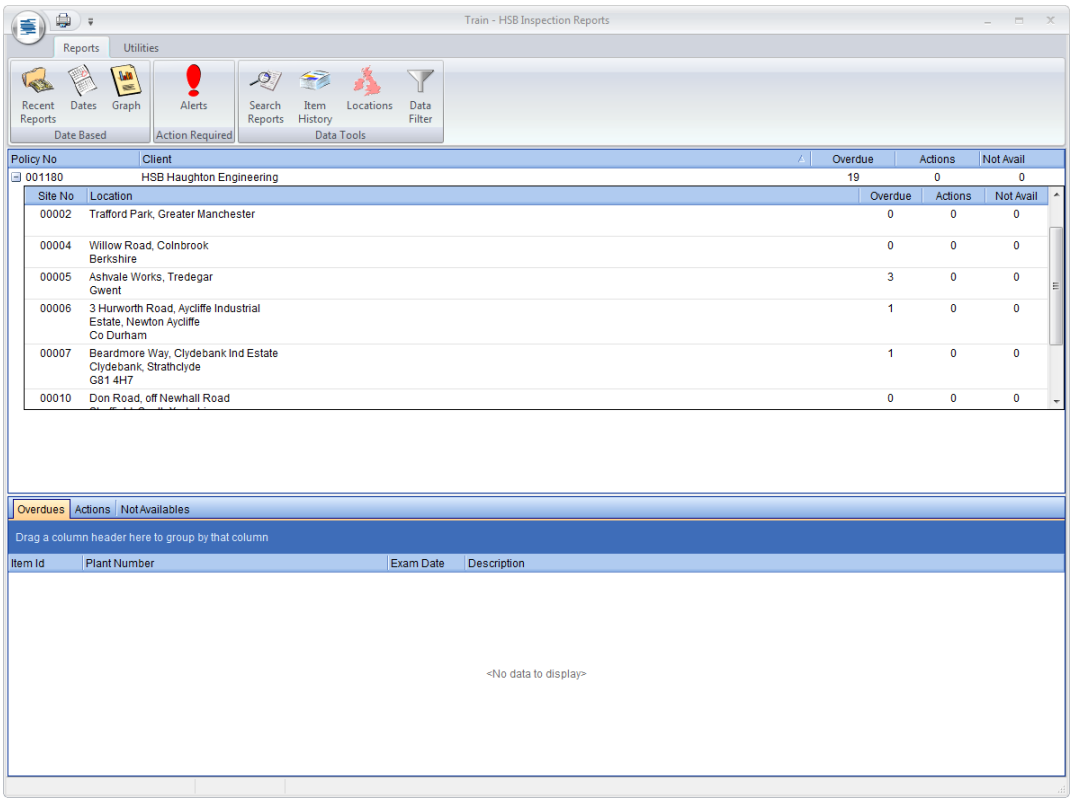
Locations



8 Locations

The Locations view enables the viewing of reports for locations or policies.

To open the Locations screen, select from the Tool Bar:



The Location screen is divided into two sections - the top section is a list of locations/companies divided up by policy number. Clicking on the + next to a location/company opens the individual locations for that policy number. The lower section of the screen offers four tabs (Overdue Items, Outstanding Actions, Not Availables and Current Plant) with a report listing for each tab.

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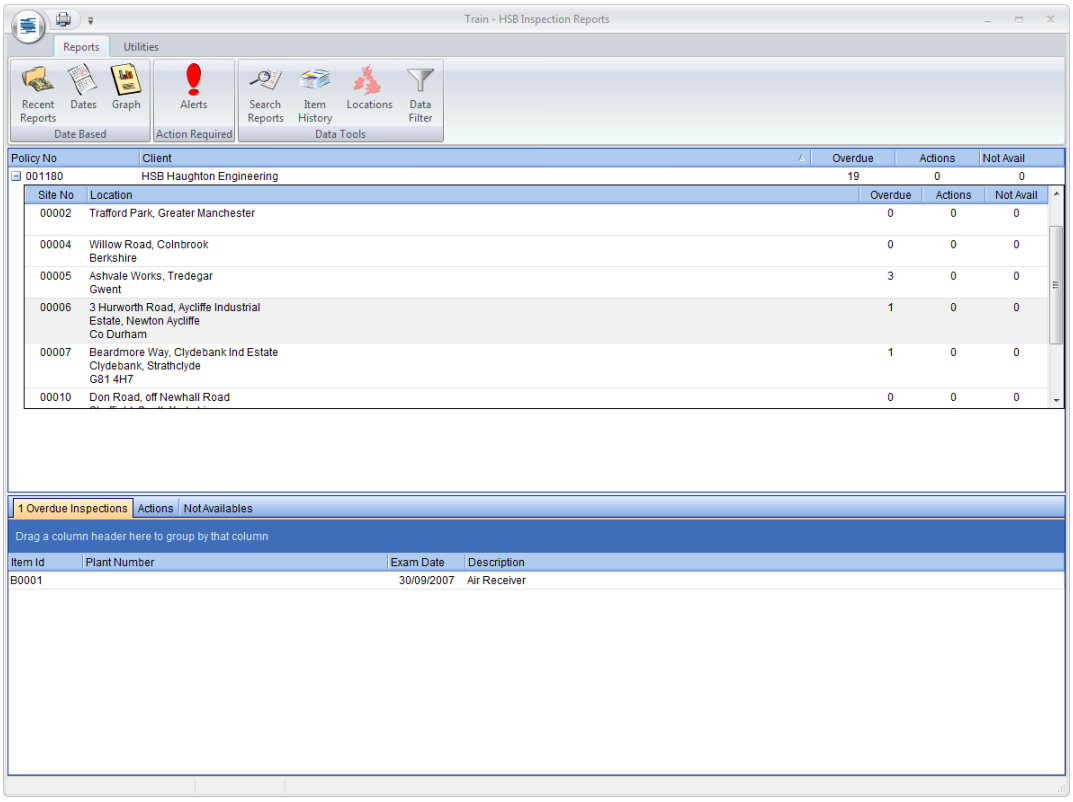
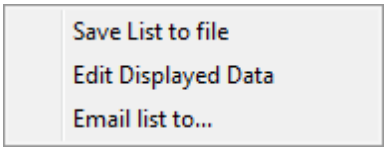
Once a specific location has been highlighted in the upper portion of the screen the Overdues tab will refresh showing a count of overdue inspections and the relevant reports:



Clicking on the other tabs will cause them to refresh and display appropriate data. NOTE: When the Actions tab is selected, its title will change to reflect the repairs/defects setting selected on the Alert screen.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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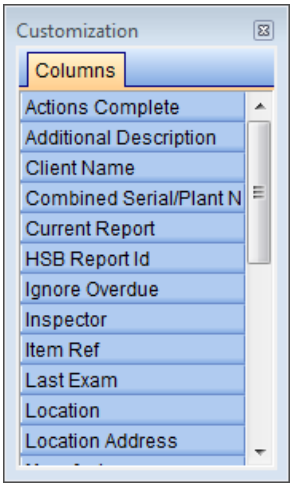
Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click Email Batch on the Tool Bar.

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3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the Utilities tab on the Menu Bar and then click {icon} Batch Print on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select {icon} Print from either the Utilities tab or in the window title area.
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